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If education is to keep up with social and technological change, teachers must be learning and developing at a rate similar to that of students, requiring the educational staff to render highly diverse and wide-ranging services. The basic strategy essential to such services is the development of differentiated staffing patterns which will allow any given school district to meet its needs in terms of available resources. Priority tasks required for differentiating the profession include (1) collecting, organizing, storing, and disseminating all necessary information (especially role definitions and staffing pattern models) and (2) utilizing this information to create a favorable climate for change. Other recommended actions include reform of pre- and inservice teacher education and re-education of teacher educators; identification of a large manpower pool; cooperation among educational agencies; and provision of financial and consultative assistance to project developers. (The report includes three appendixes: (1) lists of anticipated benefits (for students, teachers, and the public) of differentiated staffing structure; (2) an example of a differentiated staffing pattern model with task analysis for the positions of professional specialist, learning engineer, staff teacher, academic assistant, and technical assistant; and (3) a list of problem areas needing priority attention. (JS)

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REPORT ON THE TASK FORCE MEETING

ON

TASK ANALYSIS AND ROLE DEFINITION

Indiana State University

October 10 & 11, 1967

SP002220

Prepared by

Daniel C. Jordan

OUTLINE OF REPORT OF THE TASK FORCE MEETING - OCTOBER 10 & 11 AT INDIANA STATE UNIV.

TASK ANALYSIS AND ROLE DEFINITION

TASK FORCE MEMBERS

John Rand, Lonald Sharp, James Olivero, Richard Clark, and Daniel Jordan.

Following are concise summary statements on the objectives, strategies, and priorities as adopted by this task force. A more detailed outline on each statement is attached along with appendices which will provide additional useful information in understanding this report.

I. EDUCATIONAL GOALS

The overall general educational objective as adopted by this task force is: To provide learning and teaching experiences necessary to the fullest development of the potential of each student and teacher entering the school system. The staff of the educational enterprise must be learning and developing at a rate similar to that of the student if education is to keep up with social and technological change. Thus, the school must also become a place of learning for the teacher and other supporting educational personnel while the student must learn how to assume more responsibility for teaching himself.

II. STRATEGIES

Achieving the general goal stated above will require maximum efficiency in the mobilization of all available resources needed to provide those experiences. Maximum and efficient mobilization and utilization of available resources is only possible through an organizational structure that is differentiated. The problems to be solved in doing this are vast and complicated. Thus, the services to be rendered by staff members of the educational system must necessarily be highly diverse and wide ranging. The basic overall strategy essential to achieving this goal is the development of differentiated staffing patterns to meet the needs of any given local school district or system as fully as possible in terms of the resources available to that system and the provision of all supporting activities, such as training for new roles, needed to bring about the differentiation of the profession.

III. PRIORITIES

The basic priority is to collect, organize, store and disseminate all of the information necessary to undertaking this task and to utilize this information in a full scale effort to create a favorable climate for change, in the direction being recommended.

FULL OUTLINE OF TASK FORCE REPORT

I. EDUCATIONAL OBJECTIVES.

The overall general educational objective as adopted by this task force is: to provide learning and teaching experiences necessary to the fullest development of the potential of each student and teacher entering the school system. The staff of the educational enterprise must be learning and developing at a rate similar to that of the student if education is to keep up with social and technological change. Thus, the school must also become a place of learning for the teacher and other supporting educational personnel while the student must learn how to assume more responsibility for teaching himself.

In brief, we endorse the educational goals as outlined in the Taxonomy of Educational Objectives (Bloom, 1956), related to the cognitive, affective, and psycho-motor domains and the more general goals specified by the Educational Policies Commission of the National Education Association (The Central Purpose of American Education, NEA, 1961).

While accepting the goals as outlined in the works cited above, the task force recommends that special attention be given to the development of the following capacities and characteristics in each student:

1. Ability to learn in the most efficient way (this includes knowing how to learn -- how to teach himself.
2. Acquisition of basic knowledge;
3. Ability to think critically, analyze, synthesize, and make logical deductions;
4. Being motivated to learn;
5. Maintenance of the kind of self-concept which serves to foster continued growth and development of the personality;
6. Having the courage and integrity to become what he feels he can become.

I. Educational Objectives (continued)

7. Being independently resourceful and creative;

8. Having attitudes, interests, and emotional stability which will permit each one to relate satisfactorily to other human beings in a wide variety of basic youth and adult roles.

9. Having inter-personal and intra-personal skills necessary to functioning responsibly in a modern, industrial, democratic society;

10. Having self-knowledge and a knowledge of a wide range of career opportunities so that a career choice which will mutually serve both the individual and society may be made;

11. Being coginizant of present day societies, local, national and international, their achievements and their problems and having a committment to participate in solving these problems;

12. Having a capacity for aesthetic appreciation;

13. Having a capacity and desire to utilize leisure time in ways that promote growth and enrich living.

II. STRATEGIES

Achieving the goals stated above will require maximum efficiency in the mobilization of all available resources needed to provide the experiences on which the goals are dependent. Maximum and efficient mobilization and utilization of available resources are possible only through an organizational structure that is differentiated. The problems to be solved in doing this are vast and complicated. Thus, the services to be rendered by staff members of the educational system must necessarily be highly diverse and wide-ranging. Thus, the basic overall strategy essential to achieving these goals is development of differentiated staffing patterns to meet the needs of any given local school district or system as fully as possible in terms of the resources available to that system and the provision of all supporting activities, such as training people for new roles, needed to bring about the

II. Strategies (continued)

differentiation of the profession.

It should be noted that differentiated staffing is not the same as merit pay, but deals with the same problems, which the supporters of merit pay claim it will solve, in a more equitable and just way.

The following recommendations constitute a breakdown of the basic strategy into actions essential to its full implementation.

1. Establishing a Clearing House.

Establishing national clearing house which will have the responsibility of collecting, organizing, storing and disseminating information concerning task analysis and role definition of the education profession. This may include the solicitation of position papers from those in the profession who have been concerned with this development as well as reports from consultants who are paid to explore task analysis and role definition in depth.

A national conference for teacher educators, for high school principals, and superintendents, classroom teachers, or any other special group might be an efficient way of reviewing the current problems facing education and explaining the rationale behind the new proposals for staff differentiation as a means of providing a new approach to the management of learning.

2. Role definition models.

Provide suggestions for role definitions, with performance criteria for selection, retention, and promotion of educational personnel, based on task analysis, throughout the teaching, technological, service, and administrative aspects of all levels of the profession: pre-school, elementary, secondary, university, adult, and vocational.

3. Creating model patterns of staffing.

Provide working models of differentiated staffing based on task analysis in a wide variety of possible settings at different educational levels. These models may then be adapted by local systems in their efforts to implement change through differentiation of staffing. (please see Appendix 2 for one model of differentiated staffing)

II. Strategies (continued)

4. On-going teacher education (pre-service and in-service training)

There are only two basic ways to cope with the knowledge explosion:

a. make decisions about what is most relevant and what is least relevant and then deal with only the most relevant, and

b. provide a thorough on-going in-service training program for teachers so that they may receive the latest relevant information in any given field including subject-matter content, methods of teaching, and uses of new educational media. Such a program of on-going in-service training will necessarily require some full-time staff members and a close working relationship with institutions of higher education, federal and state educational agencies, and research organizations (such as regional laboratories, research and development centers, and Eric Clearing houses).

5. Re-education of teacher educators.

Provide funds and ideas for institutions of higher learning to to begin the process of re-educating their own staff who are going to be responsible for training and/or re-training educational personnel for new roles at all levels, both professional and paraprofessional.

Special programs might be developed for teacher educators to use their sabbaticals to go back into secondary and elementary schools to teach in school districts where differentiation and innovation are going on. Programs for selected public school teachers to teach some of the education courses at the university level and for university teachers to teach some of the high school courses should be explored and encouraged.

6. Leadership Development.

Provision for the development of leaders, either by training new people or training those persons already a part of existing systems who are anxious to improve the quality of education through differentiation. The purpose of this strategy is to improve the power of persons already occupying points of leverage and provide additional points of leverage by training leaders who may then occupy administrative positions through which change can be accomplished most efficiently.

7. Dissemination of Information.

Organization of programs to disseminate information on this

II. Strategies (continued)

approach to the development of the education professions and supporting rationale geared to various levels and different audiences with particular reference to state departments, credentialling organizations, professional educational organizations, school boards, teachers, administrators, business and industry and the taxpayer.

8. Modification of Public Image.

Altering the image of the education profession so that it reflects the new trends and new responsibilities being assumed by the profession. This includes altering the image in the eyes of the people who are members of the profession as well as the general public.

9. Development of Incentive Pressures for Change.

Identification and utilization of incentive pressures for change. An example of this might be competing school systems, set up to compete in the sense that a student could elect to go to whichever school he wanted to go. This would have the effect putting each staff in each school on its toes and would create an incentive for each system to vie with one another in its quest for excellence.

10. Legitimatization of roles.

Study means of legitimizing all roles in the differentiated pattern of staffing at all levels so that persons performing the different roles feel and understand that their contribution is needed and worthwhile.

11. Identification of larger manpower pool.

Identification of and provision of training programs for persons currently working outside formal educational institutions, such as actors, and other professionals and para-professionals who may be brought in to fill new positions in the educational enterprise as they are created, on both a part-time or a full-time basis.

12. Facilitating cooperation among educational agencies.

Provide working models of cooperative arrangements among educational agencies, particularly universities, state educational agencies, and local school systems, for the purpose of facilitating efficient collaboration in implementing programs which will promote the purposes of the act.

II. Strategies (continued)

13. Assistance in planning programs.

Provide direct assistance to universities and school districts in planning programs and formulating proposals for financial assistance. This may take the form of offering trained consultants who will help universities and school districts with needs and resources assessment, program design and evaluation, budget estimation, and general feasibility study.

14. Provision of state plan models.

Provide models of state plans called for by that part of the act dealing with the recruitment of additional educational personnel from manpower sources other than teacher training institutions. State departments may welcome model plans which they may adapt to state needs, resources, and conditions.

15. Sensitivity training for persons going into new roles.

Provide suggestions and encouragement for programs of sensitivity training for persons who will be responsible for assuming new role responsibilities which in turn will necessitate establishing new relationships with different kinds of people also trying to master new roles and develop new relationships.

16. Anxiety management.

Provide models and suggestions of ways and means to manage anxiety and use it constructively in those systems who undertake progressive change of their organization in the direction of differentiated staff. Since it is impossible to change any given role in a system without affecting all other roles and persons occupying them, these kinds of structural changes are always accompanied by feelings of insecurity, ego threats, fear of loss of status and a great deal of anxiety. If this is consciously recognized and means are provided for relieving that anxiety by using it constructively the transitional operation will be greatly facilitated.

17.. Coordination with other programs.

Provision should be made for the collaboration of programs being carried out under the authorization of other legislation (such as NDEA, and ESEA).

III. PRIORITIES

The basic priority is to collect, organize, store and disseminate all of the information necessary to undertaking this task and to utilize this information in a full scale effort to create a favorable climate for change, in the direction being recommended. The task force identified three basic kinds of priorities:

1. Priorities in the locality of change;
2. Priorities in the order of actions for implementation of provisions of EPDA; and
3. Priorities in the distribution of funds.

Priorities in locality of change.

1. Disadvantaged areas (both rural and urban);
2. Other areas of critical shortages; and
3. Any school districts or individual schools or institutions of higher learning where firm committments are made to the achievement of the goals of the EPDA.

Priorities in the order of actions for implementation of provisions of EPDA.

1. Clearing House.

Establish a clearing house on information concerning role differentiation and task analysis so that all persons and organizations concerned with active implementation of the provisions of EPDA can have access to all the basic information available.

2. Models of differentiated staffing patterns.

Provision of working models of school differentiated school systems with clearly specified examples of role definitions based on task analysis and performance criteria for selection, retention and promotion of personnel.

3. Creating climate for change.

Dissemination of information throughout the profession and to the public for the purpose of creating a climate for change and alteration of the public immage of education. Another function of the dissemination of information is to encourage an active dialogue about the educational process and the ways in which it might be modified in order to improve it.

III. Priorities (continued)

4. Provision of assistance for planning programs and writing proposals.

This may well take the form of consultant teams which can provide for local school districts and institutions of higher education and assistance in:

a. Surveying local needs and resources.

b. Designing programs with sound, built-in evaluation procedures.

c. Making budget estimations, and

d. Carrying out general feasibility studies.

5. Leadership training.

Providing leadership training for persons who are concerned with the implementation of the provisions of EPDA and who also occupy positions which may be considered as critical points of leverage where leadership may be exercised with maximum effect.

Priorities in the distribution of funds.

Assuming the basic content of the proposals to be equal, preference should be given to:

1. Those proposals which provide for a sound research design for evaluation;

2. Proposals which are jointly sponsored by several educational agencies, particularly those sponsored jointly by institutions of higher education and local school districts;

3. Projects which have built into their plans provisions for continuation of the program into the future;

4. Proposals which create large demonstration centers which have the potential for effecting significant and permanent change; and

5. Proposals which reflect a committment to the goals of EPDA on the part of the institutions submitting them.

APPENDIX I

ANTICIPATED BENEFITS COMING FROM DIFFERENTIATED STAFFING STRUCTURE

FOR STUDENTS:

1. Will be exposed to more up to date information.
2. Will receive more individualized attention.
3. Will learn how to assume greater responsibility, in participating in their own learning, and in the management of learning generally.
4. Will have greater resources available which will more efficiently used
5. Will have better prepared instruction in terms of both material, equipment and people.
6. Will have reduced inclination to drop out because of more meaningful experience in school (i.e. learning will be characterized a greater relevance both in the kinds of activities and the content to be mastered.

FOR TEACHERS.

1. Will bring more male teachers into the elementary school system.
2. More teachers will stay in the inter-city schools.
3. Working conditions will be greatly improved.
4. Enable teachers to participate in making of decisions affecting the system as a whole.
5. Conservation of time (i.e., more time to teach)
6. Greater use of specialized talents.
7. Greater rewards for teachers.
8. Increase in the retention rate of teachers.
9. Will provide an expanded pool from which educational personnel can be drawn thereby reducing the shortage of teachers in facilitating innovation.
10. Provides a system of self monitoring for the entire profession.

FOR THE PUBLIC

1. More efficient use of the tax dollar.
2. More efficient use of community resources.
3. Better service to the children.
4. Reduction of drop out rates, and therefore delinquency rates.
5. Enables the school to assume more direct responsibility in the solution of social problems which are a burden on the public.

APPENDIX II

EXAMPLE OF POSSIBLE MODEL OF DIFFERENTIATED STAFFING PATTERN

The task force readily endorsed the notion that providing experiences for the education of citizens in this day and age involves much more than what has traditionally been referred to as teaching. It is perhaps more fruitful to regard the total educational enterprise in terms of the management of learning.

As an example of one way to look at differentiation of staff, the task force divided the management of learning process into six basic units of activities, each one of which requires a wide range of behaviors which belong to different positions and different roles.

The six basic units are:

1. Educational personnel training (teacher education)
2. Teaching
3. Production and utilization of instructional media and materials
4. Administration
5. Pupil personnel
6. Community services

As an example, the task force differentiated only part of one of these units, the unit of teaching. The task analysis of the teaching function was limited to the teaching responsibilities now carried out by elementary and secondary schools, and does not include adult education, ecucation of the handicapped, vocational education or education of pre-school children. Obviously, a great many additional tasks are required to carry out teaching functions for special groups and thus a great number of aditonal different roles would have to be defined.

In the example that follows, the teaching function aspect of the management of learning has been broken down into various tasks. These tasks represent the functions or roles of a basic staff which has been differentiated into five basic positions:

1. Professional specialist
2. Learning engineer (master or artist teacher)
3. Staff teacher
4. Academic assistants
5. Technical assistants

Below, each one of these positions has assigned to it a number of tasks which, when performed, become the roles of the persons occupying those positions. In many instances, the same role may be performed by persons occupying two or more of the positions. In other words, all tasks do not necessarily belong to mutually exclusive categories.

1. Professional specialist (e.g., research experts, curriculum experts, media expert, testing and diagnosis expert, guidance expert).

    a. Diagnosis of educational status of student

    b. Prescription of experiences designed to remove deficits as revealed by the diagnosis.

    c. Evaluation of educational progress.

    d. Participation in professional activities.

    e. Participating in learning activities to insure professional and personal growth.

    f. Participation in planning and decision making relative to the overall educational program.

    g. Keeping abreast with the latest information in each of the subject area fields

    h. Keeping abreast of developments in communications media and other aspects of educational technology.

    i. Participating in the on-going in-service training program for all staff (this represents the institutionalization of innovation).

2. Learning engineer (master or artist teacher)

    a. Diagnosis and prescription.

    b. Adaptation of curriculum

c. Evaluation of educational process.

d. Helping to establish the room or other environments conducive to learning.

e. Assisting in the selection of instructional materials.

f. Engaging in professional activities.

g. Participating in learning activities to insure professional and personal growth.

h. Participation in planning and decision making relative to the whole educational program.

i. Supervision of student teachers and interns.

j. Identification of and helping to recruit prospective teachers as they come up through the system.

k. Supervising supporting staff

l. Working with staff teacher in the identification of learning problems and assisting him in the mobilization of resources to facilitate solution of problems and learning in general.

3. Staff Teacher

a. Adaptation of curriculum to needs of immediate students being taught.

b. Evaluation of educational progress.

c. Establishing learning environments.

d. Providing for individual instruction.

e. Selecting instructional materials.

f. Selecting a wide variety of activities designed to achieve learning objectives.

g. Selecting and using the method of instruction and the use of different media.

h. Participating in parent conferences.

i. Engaging in professional activities.

j. Participating in learning activities, to insure professional and personal growth.

k. Participating in planning and decision making relative to the total educational system.

l. Identifying and helping to recruit prospective teacher.

m. Providing feedback on curriculum to learning engineer and professional specialists.

n. Establishing and maintaining a rapport with students and staff.

o. Maintaining discipline.

p. Imparting information (curriculum content and feedback to students on their performance--thinking processes, added to expression and skills).

q. Function as model of educated person.

r. Assist in the identification of learning disorders.

s. Help to establish a love of learning.

t. Advising and counseling.

u. Participating in small group work.

v. Grading papers for evaluating performance of students.

w. Supervise supporting staff

x. Acquaint the group with learning objectives.

y. Distribute rewards in order to facilitate the learning process.

4. Academic Assistants (volunteer help, college tutors, FTA's, Interns, student teachers, club sponsors, etc.)

a. Participation in the evaluation of educational progress.

b. Supervision of non-academic learning activities.

c. Helping to maintain discipline.

d. Imparting information needed to carry out learning activities.

e. Participate in small group work.

f. Grade papers and provide feedback on performance of other kinds of learning activities.

g. Supervise study.

h. Ground supervision.

5. Technical Assistants

a. Assistants who deal with "things".

1. Filing
2. Typing
3. Collecting money
4. Taking attendance
5. Keeping records
6. Duplicating materials
7. Operating machinery
8. TAking inventory
9. Certain kinds of record keeping
10. Reporting
11. Policing the room
12. Ordering supplies
13. Grading papers
14. Record keeping on pupil progress
15. Participating in activities to insure personal growth.

b. Working with people

1. Playground supervision
2. Hall duty
3. Supervision of study
4. Story tellers
5. Field trip chaperones
6. Recreational activities supervisory

7. Helping to maintain discipline.

8. Supervision of non-academic learning activities.

The list of the above tasks, organized under differentiated positions falling under the category of teaching as one basic unit of activities in the management of learning, does not profess to be complete. This is only intended as a possible model. Lines of authority and lines of cummunication have not been specified. Obviously different arrangements are possible. It was the feeling of the task force however that the learning engineer or master teacher and his work with the staff teacher are central to the structure and all other positions are supportive of their activities, including the professional specialist.

APPENDIX III

PROBLEM AREAS NEEDING ATTENTION IN ORDER TO FACILITATE CHANGE

The task force identified the following problem areas which must receive attention if change is to be facilitated:

1. Coping with ego-threats, anxiety, and fear of loss of status created by proposed changes.

2. Defining organizational relationships (among such organizations as state boards of education, school boards, individual school administrative offices, teachers' groups, faculty senates and councils, professional associations, and parent organizations), so that all of the organizations may move into the period of change with mutual support.

3. Arriving at new financial arrangements to accomodate the change.

4. Credentialling problems.

5. Developing acceptable criteria for the selection and evaluation of personnel needed to perform new roles.

6. Problem of re-education of current staff to new system.

7. Re-education of teacher educators and modification of training programs so that educational personnel destined to serve in the differentiated roles of the future can be properly trained.

8. Alteration of the self-image of the education profession so that the change can be welcomed, new roles assimilated, and the pain of transition minimized.

9. Establishing new criteria by which to evaluate effective performance of all roles necessary to the management of learning so that persons may move up the career ladder in a just and equitable manner.

10. Inexperience in delegating responsibility on the part of education administrators and teachers and inexperience in supervising work of those to whom responsibilities have been delegated.

11. Since it is the nature of any on-going organization to have investments in traditional ways of doing things, one problem area will be concerned with finding the best ways and means for professional organizations to transfer their investment to experimental programs and empirically validated systems of learning management.

12. While students may need some re-orientation, they may be expected to be among those who welcome the change and will accomodate it with greatest facility.